Microsoft Exchange Server

Chapter 6.2
Moving Exchange Public Folders to Exchange 2000

Deployment Guide

Abstract

This section outlines the steps required to move Exchange 5.5 public folders to Exchange 2000 servers. After completing these steps, you will be able to access information held in public folders by using the new data access methods in Exchange 2000, such as the web store and URL addressing. Moving or rehoming your public folders is also a necessary step before you can remove the Exchange 5.5 servers from your organization and converting to native mode.

This is a preview edition of the Microsoft Exchange 2000 Server Upgrade Series. The final documentation will be available in November 2000.

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INTRODUCTION

In the previous section, you covered the process for moving mailboxes from Exchange 5.5 to Exchange 2000. Normally, the next step is to re-home the public folders currently hosted on Exchange 5.5 onto the new Exchange 2000 servers.

By following the procedures in this section, you will learn how to move public folders from any downlevel Exchange server to an Exchange 2000 server in the same organization. Once you have done this, you can then continue with the process of decommissioning your Exchange 5.5 servers.

Most organizations that upgrade to Exchange 2000 will want to move their public folders to Exchange 2000 to take advantage of the enhanced features, such as the web store, storage groups, and multiple public folder databases. Moving public folders from Exchange 5.5 servers to Exchange 2000 servers is another step in decommissioning the Exchange 5.5 servers. Once you have done this, you can convert your organization to native mode, thus enabling the advanced features of Exchange 2000.

Chapter Organization

This chapter consists of the following sections:

- Preparing for public folder rehoming issues
- Rehoming public folders to Exchange 2000
- Decommissioning Exchange 5.5 systems
- Recovering after a failed public folder move

You should first look at the design considerations and prerequisites before you start on the rehoming procedures themselves.

Design Considerations

You should already have considered the design implications of rehoming public folders on Exchange 2000 as part of your planning documentation in the Architecture section. You should know the reasons why you are planning to implement this procedure and the risks associated with this move.

For you to carry out the rehoming process, you need an Exchange 2000 server installed in the same organization in which your public folder server is currently installed.

Resource Requirements

This section gives you details of the resources you need to move public folders from downlevel Exchange systems to an Exchange 2000 server.

PROCESS FLOWCHART

Public Folder Rights

You will need to be a member of the current Exchange administrators group if you are going to make the changes outlined in this chapter.

Security and Account Privileges

The account you use to perform this process will need to have Exchange Administrator privileges in the Exchange 2000 Administrative Group that the server is installed into, and downlevel Exchange Administrator rights in the Exchange site in which the public folders are originally hosted.

Skills

If you are performing this task, you should have experience administering Exchange 5.5. If you don't have these skills, please read the following web page for information: "Microsoft Exchange Server 5.5 Series - Accelerated Training for Administration and Implementation" available from:

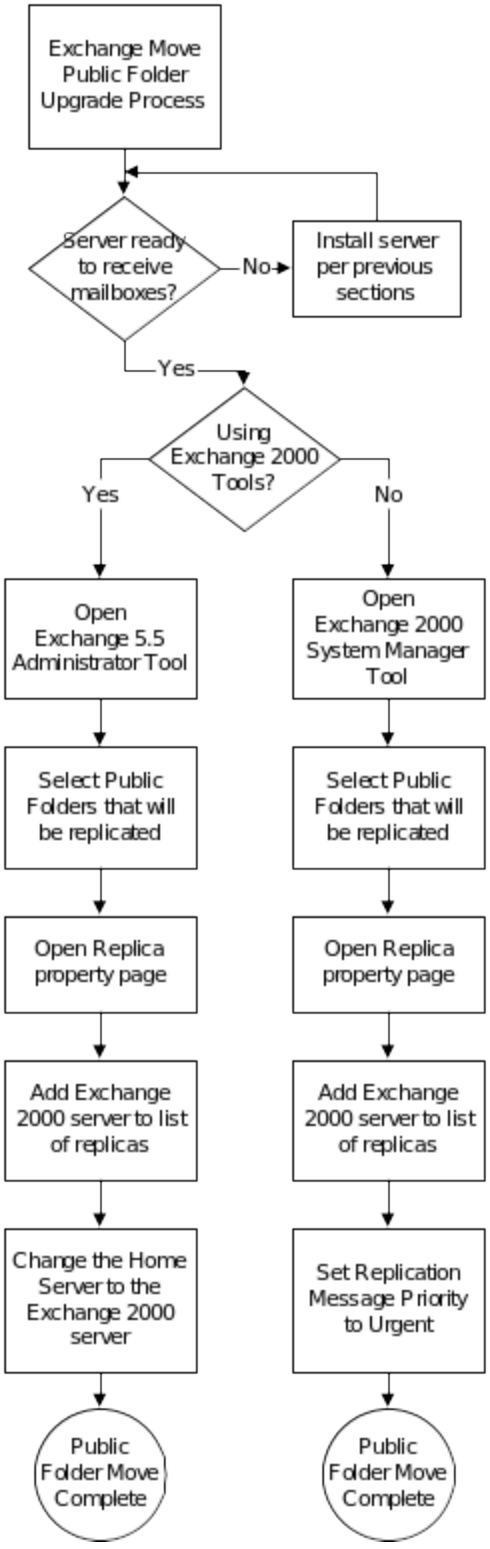
http://www.microsoft.com/trainingandservices/syllabi/syllasearch.asp?PageURL=/TrainingAndServices/content/syllabi/1313afinal.txt

Experience administrating Exchange 2000 is an added bonus; however, considering the goal of this guide, this isn't a requirement.

System Prerequisites

To move Public Folders to an Exchange 2000 server in an existing Exchange organization, you need to have installed an Exchange 2000 server in your organization. For information on how to do this, see Chapter 4, "Installing Exchange 2000."

PREPARING FOR PUBLIC FOLDER REHOMING


Exchange Move Public Folder Upgrade Process
Server ready to receive mailboxes?
No
Install server per previous sections
Yes
Using Exchange 2000 Tools?
Yes
No
Open Exchange 5.5 Administrator Tool
Open Exchange 2000 System Manager Tool
Select Public Folders that will be replicated
Select Public Folders that will be replicated
Open Replica property page
Open Replica property page
Add Exchange 2000 server to list of replicas
Add Exchange 2000 server to list of replicas
Change the Home Server to the Exchange 2000 server
Set Replication Message Priority to Urgent
Public Folder Move Complete
Public Folder Move Complete

Before you create a rollback position for a public folder rehome/upgrade, you should first understand what happens during this process. In a public

folder rehome/upgrade, the public folder replicates the contents of the public folders to the new server. The directory then updates to reflect the new replica of the public folder. Once this has completed, users can now access the public folder content on either the old Exchange server or the new one.

If either of these public folder servers is offline, the users will be sent to the other server. Therefore, the contents of the public folders are always available, regardless of the position of the migration. This allows for full access to all data once replication has completed.

This process is just like creating a replica of a share. The information in the original share is still available, regardless of the progress of the copy procedure. The effect of this is that there isn't a immediate requirement for a rollback position during the rehoming process. However, it is good engineering practice to make backups of both the sending and receiving Exchange servers before proceeding with this upgrade process.

What You Will Need

To carry out the preparation for public folder rehoming you need:

- Exchange 5.5 backup software
- Exchange 2000 backup software
- Documented Exchange 5.5 backup procedures
- Documented Exchange 2000 procedures
- An account name and password that has permissions to backup the server that will be upgraded

The Procedure

You should now perform an online backup of all affected Exchange databases (using your standard Exchange server backup procedures) on both Exchange 5.5 and Exchange 2000. Once this backup is complete, you are ready to start replicating public folders to the new server.

With the precautions out of the way, you can now continue with the rehoming process. This procedure is really very much the same as the one that you would use to create a replica of a public folder within Exchange 5.5. In fact, you can carry out this process using either the Exchange 5.5 or the Exchange 2000 administration tools. Steps for both processes are listed below.

What You Will Need

To carry out this procedure, you will require the following:

- An Exchange 5.5 server with existing public folders.
- An Exchange 2000 server in the same organization that will receive

the public folders.

- The name and password for an account with Exchange 2000 Administrator privileges and Exchange 5.5 Administrator privileges (see the Resource Requirements section for details).

The Moving Process

When you move public folder resources to Exchange 2000 servers, you perform a replication to the new server, and then rehome the item to the Exchange 2000 server. This replication can be performed with either the Exchange 5.5 or the Exchange 2000 tools.

The following steps are performed if the Exchange 5.5 Administration application is used to perform this replication. Steps for performing the same task by using the Exchange 2000 System Manager tool follow.

Using the Exchange 5.5 Administrator Tool

To perform the folder replication by using the Exchange 5.5 Administrator tool, click **Start**, point to **Programs**, point to **Microsoft Exchange**, and then click **Microsoft Exchange Administrator**.

1. Expand the organization in the left hand pane, expand **Folders** and then expand **Public Folders**.
2. Click the public folder that you want to replicate.
3. From the **File** menu, choose **Properties**.
4. From the public folder's property pages, select the **Replicas** tab.
5. On the **Replicas** tab, from the Servers list, select the Exchange 2000 server onto which you want to create a replica, and click **Add**. Then click **OK**.

Note: Do not perform the following steps until you are certain you no longer need the Exchange 5.5 server. You should allow plenty of time for the public folder to replicate, especially if you are replicating a large folder.

6. After replication has completed, click **Properties** again. On the **Advanced** tab, from the **Home Server** list, select the Exchange 2000 server that hosts the replica of the public folder. Click **OK**.
7. The **Performing Directory Replication Update** page updates Exchange 2000 Active Directory with public folder information. This is necessary because Exchange public folders typically do not exist in the Windows 2000 Active Directory. The reason for this is that unless a Public Folder is given an address, it does not exist in Active Directory. This is not the case with Exchange 5.5, which maintains its own directory service.
8. After the closing the property pages, you may see a message box with the following text:

You have changed the home server for this public folder. This change will not take affect until after replication has completed, which may take some time.

This is because directory replication between the Exchange 5.5 directory and Active Directory is not an immediate process. After the replication is complete, the public folder is homed on the Exchange 2000 server.

Using the Exchange 2000 System Manager Tool

The Exchange 2000 System Manager tool is in the same location as the Exchange 5.5 Administrator tool. To open the tool, click **Start**, point to **Programs**, point to **Microsoft Exchange**, and then click **System Manager**.

1. Expand **Administrative Groups**, expand *ExchangeSite* (where *ExchangeSite* is the name of the site containing the public folders you want to move), expand **Folders**, expand **Public Folders**, and then select the public folder that you want to replicate.
2. On the **Action** menu, click **Properties**.
3. Click the **Replication** tab.
4. Click **Add** to see a list of servers to which you can replicate the public folder.
5. The list includes only the servers that have public folder databases. Select the Exchange 2000 server to which you want the public folder replicated, and then click **OK**.
6. On the **Replication message priority** page, set the urgency of the replication to **Urgent**.

Note: With the public folder replication urgency setting, you can ensure that a public folder is updated as quickly as it receives data. The default setting is Not Urgent. However, you can use this list to set a priority for messages sent by this public folder when replication is interrupted or completes with warnings.

7. Click **OK** to initiate the replication.

Unlike Exchange 5.5, there is no obvious way to set a home server for a public folder. Any replica acts as primary for the data it holds, and any public folder server can be removed from the replica list. There is no concept of an Exchange 2000 site outside of the legacy Exchange 5.5 system. So, you cannot orphan a public folder because the server where it was homed in the site was removed and the replica in the other site still exists.

Public Folder Management Enhancements

In Exchange 5.5, public folders could be difficult to manage. For example, you could not create and delete public folders from within the Exchange Administrator tool, as these functions could only be performed by using

Outlook or the Exchange client. This has all changed in Exchange 2000. You can now create, modify, and delete public folders when using Exchange 2000 System Manager, as is shown in the following figure.

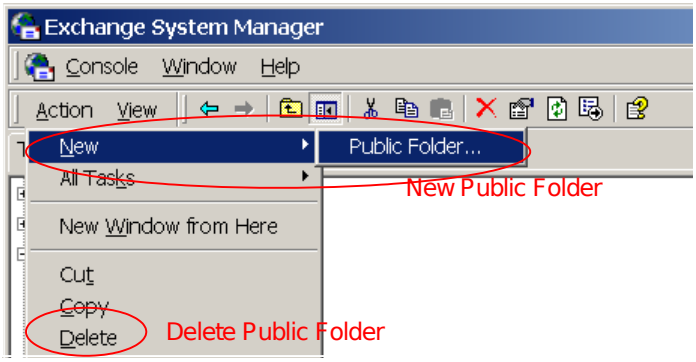


Figure 1 Exchange System Manager With Public Folder Creation and Deletion Options

Decommissioning Exchange 5.5 Systems

For information on decommissioning downlevel Exchange 5.5 servers, see the relevant section in the previous chapter

As you saw in the discussion at the beginning of this chapter, there is no reason that recovery should be necessary when moving public folders. If the public folder failed to move, it is still on the original server and doesn't need to be recovered. If the public folder is on the new server, the replication succeeded. And, unlike a mailbox move, the copy of the public folder is still on the original server even after you have replicated it to the new server. However, since Murphy's Law always applies, it is worth taking a full backup of your Exchange servers before you start. Also, you may find that there are issues with the new server that aren't related to the public folder move process.

What You Will Need

To carry out this procedure you will need:

- An Exchange 5.5 server
- A fully installed Exchange 2000 server in the same Exchange site as the Exchange 5.5 server and a list of public folders to replicate from that server.
- The name and password for an account with Exchange 2000 Administrator privileges and Exchange 5.5 Admin privileges (see the Resource Requirements section for details).

SUMMARY

The Recovery Procedure

If you find yourself needing to recover during the replication process, you will need to remove the Exchange 2000 public folder replica. What you need to do here is to remove the Exchange 2000 server from the active replica lists for all the replicated public folders. To do this, follow the same procedures that you did in the previous section, except for the following changes:

If using the Exchange 5.5 Administrator tool, perform steps 1-3 again, but rather than adding the Exchange 2000 server to the replica list, remove it.

If using the Exchange 2000 System Manager tool, perform steps 1 and 2 again, then highlight the Exchange 2000 server and press the **Remove** button.

Once you've completed these steps, you will have removed your public folder replicas from your Exchange 2000 servers. Since the original replicas were never deleted, you will be back to your original public folder configuration.

In this chapter, you learned how to create replicas of your public folders from Exchange 5.5 to Exchange 2000 systems. You were shown how to do this with little effect on your current infrastructure, and how to remove the Exchange 2000 replicas if necessary. After completing this process, you will probably want to decommission your Exchange 5.5 servers as part of your migration plan.

More Information

For more information on moving public folders to Exchange 2000 servers in downlevel Exchange 5.5 organizations, see the following document:

Guide to Upgrading from Exchange Server 5.5 to Exchange 2000 Server

http://www.microsoft.com/exchange/productinfo/E2KGuide.htm